2-7

Contract Maintenance: Review Work Items

Objectives

View Work Items Create a Work Item Update a Work Item Void a Work Item

About Work Items

DOT contracts sometimes include consolidated line items that represent multiple items of work. Design Build contracts for example, may have a single consolidated line item that encompasses the design, construction and inspection of the entire project. Conventional contracts may contain one or more consolidated line items used to represent large portions of the project. For example:

- ◆ A Design Build contract may have a consolidated line item like: *Design, Construction and Inspection,* quantity 1, unit price \$70,900,000.00.
- ◆ A Conventional Lump Sum contract may have multiple consolidated line items like: *Construction of Superstructure*, quantity 1, unit price \$154,000.00; and *Roadway Construction*, quantity 1, unit price \$191,000.00.

These consolidated line items are received by HiCAMS via the SPECS interface. They usually have no materials associated in the Contract Bill of Materials (CBOM), and are primarily useful for project planning and payment. Once in HiCAMS, however; project personnel with the appropriate security should add and maintain the individual work items required to complete each consolidated line item. These individual work items and their associated materials will be used when entering Samples, Field Inspection Reports, Density tests and other information required for Project Certification. For example:

- ◆ The Design Build line item Design, Construction, and Inspection above, may require many work items like: AGGREGATE BASE COURSE, SELECT MATERIAL CLASS IV, ASP CONC SUR CRS S9.5C, 11" PCC PVMT – THRU LANES, ASP CONC INT CRS I19.0C, etc.
- ◆ The Conventional contract line item *Roadway Construction* above, may require a few work items like: AGGREGATE BASE COURSE, STL BM GUARDRAIL, and ASP CONC SUR CRS \$9.5C.

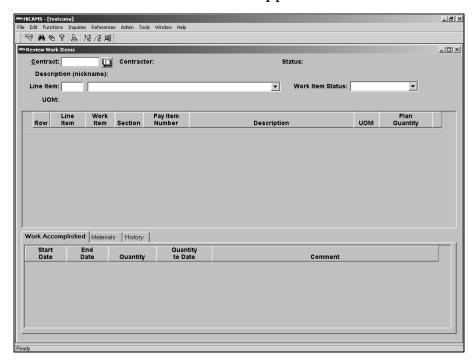
This chapter will discuss how to add and maintain these work items.

View Work Items

Step 1: Log onto HiCAMS, using the instructions in "HiCAMS Getting Started."

Step 2: Select Contract Maintenance from the Functions menu and choose Review Work Items from the sub-menu that appears.

The **Review Work Items** window appears:



- **Step 3:** Enter the contract number to work with using one of these procedures:
 - ◆ Type the contract number in the **Contract** field and press Enter.
 - ◆ Choose a contract following this procedure:
 - a) Click the book icon to the right of the **Contract** field.

The **Contract Selection** window appears.



Tip: The information in the window is sorted by contract number, in ascending order. To change the sort order or type, click on the corresponding column title.

- b) By default, the contracts displayed in the window are those associated with your office. To select a contract from another location, select it from the list box in the **Location** field.
- c) To display contracts in a particular status, select your choice from the list box in the **Status** field.
- d) Find the contract you want to select from the list in the window, using the scroll bar, if necessary.
- e) Click **OK**.

The **Line Item** drop down list is populated with line items from the selected contract.

Step 4: Select a line item to work with using one of the following procedures.

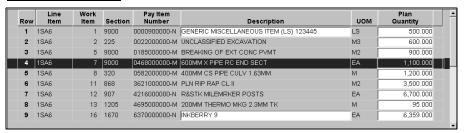
- ◆ Type a line item number in the **Line Item** field.
- Select a line item from the **Line Item** drop down list.

Work items associated with the selected contract and line item appear.

Note: If you are unsure of which line item to choose, select <ALL> from the **Line Item** drop down list to view all work items.

Field Definitions

Work Item Grid



Line Item: Displays the payable line item number.

Work Item: Displays the work item number.

Section: Displays the work item's section number from the Master Pay Item list.

Pay Item Number: Displays the work item's pay item number from the Master Pay Item list.

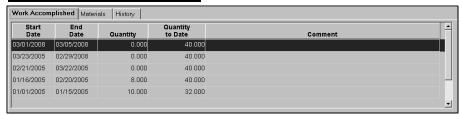
Description: Displays the work item description.

UOM: Displays the work item's unit of measure.

Quantity: Displays the quantity of the work item to be installed or completed upon project completion.

Status: Displays the status of the work item.

Work Accomplished Tab:



Start Date: Displays the start date of each work period associated with the selected work item.

End Date: Displays the end date of each work period associated with the selected work item.

Quantity: Displays the quantity of work accomplished for each work period.

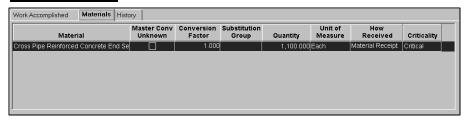
Quantity to Date: Displays the total quantity of work accomplished to date for the selected work item.

Comment: Displays any comments associated with the work period.

Note: The information displayed on the **Work Accomplished** tab is dependent upon the item selected in the **Work Item** grid. Data on this tab is for information purposes only. If no work accomplished

has been entered against the selected work item, this tab will appear blank. Information on this tab can also be found on the **Review Work Accomplished** window.

Materials Tab:



Material: Displays a description of each material associated with the selected work item.

Master Conv Unknown: Displays an indicator (checkmark) if no standard conversion factor exists for the material and line item in the Master Bill of Materials (MBOM). Materials where the master conversion factor is unknown have conversion factors that are specific to the contract.

Conversion Factor: Displays the conversion factor from the CBOM for each material on the selected work item.

Substitution Group: Displays the substitution group from the CBOM for each material on the selected work item.

Quantity: Displays the quantity of material to be used in completing the Work Item. Derived by multiplying the Work Item quantity by the conversion factor.

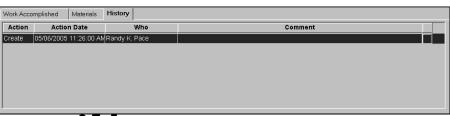
Unit Of Measure: Displays the unit of measure for each material associated with the selected work item.

How Received: Displays the method by which the material should be received within the HiCAMS application based on the current MSG settings.

Criticality: Displays the material's criticality based on the current MSG settings.

Note: The information displayed on the Materials tab is dependant upon the item selected in the Work Item grid. Data on this tab is for information purposes only. If no materials exist for the selected item, this tab will appear blank. Information on this tab can also be found on the Review Contract BOM window.

History Tab:



Action: Displays the action taken.

Action Date: Displays the date the action was taken.

Who: Displays the user name of the person who took the action.

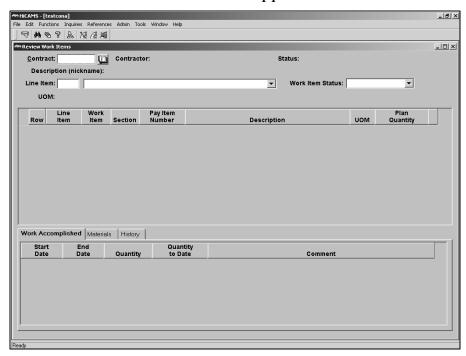
Comment: Displays additional information regarding the action.

Create Work Items

Step 1: Log onto HiCAMS, using the instructions in "HiCAMS Getting Started."

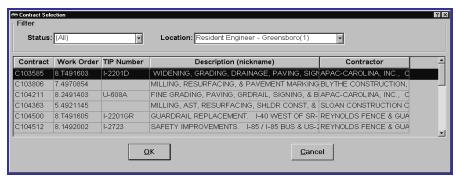
Step 2: Select Contract Maintenance from the Functions menu and choose Review Work Items from the sub-menu that appears.

The **Review Work Items** window appears:



- **Step 3:** Enter the contract number to work with using one of these procedures:
 - ◆ Type the contract number in the **Contract** field and press Enter.
 - ♦ Choose a contract following this procedure:
 - a) Click the book icon to the right of the **Contract** field.

The **Contract Selection** window appears.



Tip: The information in the window is sorted by contract number, in ascending order. To change the sort order or type, click on the corresponding column title.

- b) By default, the contracts displayed in the window are those associated with your office. To select a contract from another location, select it from the list box in the **Location** field.
- c) To display contracts in a particular status, select your choice from the list box in the **Status** field.
- d) Find the contract you want to select from the list in the window, using the scroll bar, if necessary.
- e) Click **OK**.

The **Line Item** drop down list is populated with line items from the selected contract.

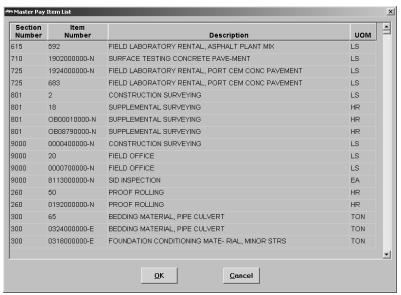
- **Step 4:** Select a line item that the new work item should be associated with using one of the following procedures:
 - ◆ Type a line item number in the **Line Item** field.
 - ◆ Select a line item from the **Line Item** drop down list.

Information associated with the selected contract and line item appears.

Step 5: Click the Insert icon on the toolbar.



The **Work Item** selection window appears.



Step 6: Select the desired work item(s) from the list using one of the following procedures:

- ♦ To select a single item:
 - a) Click on the appropriate row to highlight the desired work item
 - b) Click OK.
- ♦ To select a range of items:
 - a) Click on the first row in the range
 - b) Hold down the [Shift] key and click the last row in the range.
 - c) Release the [Shift] key and click OK.
- ◆ To select multiple items not in a range:
 - a) Click on one of the desired items
 - b) Hold down the [Ctrl] key and click each additional item.
 - c) Release the [Ctrl] key and click OK.

The **Review Work Items** window appears with the selected work items inserted.

Tip: The line item number you selected in step 4 has been copied by default to each new work item. The default line item can be changed on each row if necessary.

If one or more generic items were selected, continue with Step 7. If no generic items were selected, skip to step 8.

- **Step 7:** Update each generic item description by clicking in the **Description** field and editing and/or adding to the existing text.
- **Step 8:** Enter a quantity for each new work item.
- Step 9: Click the Save icon on the toolbar.

The new work items are saved and the Contract Bill of Materials (CBOM) is updated with the appropriate materials from the Master Bill of Materials (MBOM).

Update a Work Item

Step 1: Complete steps 1 – 4 under *Accessing a Work Item*.

Step 2: Click in the **Description** field to edit the generic item description.

Step 3: Click in the **Quantity** field to edit the quantity of the work item.

Step 4: Click the Save icon on the toolbar.

The updated information is saved.

Void a Work Item

Step 1: Complete steps 1 – 4 under *Accessing a Work Item.*

Step 2: Right-Click on the work item to be updated.

Step 3: Select *VOID* from the popup menu

Step 4: Click the Save icon on the toolbar.

The updated information is saved.